



User Permissions Guide for Contract Insight Solutions

Contract Insight Enterprise Core System Permissions

Permission	Description	Admin User	Super User	Standard User	Read-Only User
Calendar: Display All Contract Record Alerts	Display ALL contract alerts on employee's calendar.	Yes	Yes	Yes	Yes
Calendar: Display All Contract Task Alerts	Display ALL contract task alerts on employee's calendar.	Yes	Yes	Yes	Yes
Calendar: Display All Request Task Alerts	Display ALL request task alerts on employee's calendar.	Yes	Yes	Yes	Yes
Calendar: Display All Vendor/Customer Task Alerts	Display ALL vendor/customer task alerts on employee's calendar.	Yes	Yes	Yes	Yes
Calendar: Display My Contract Dept. Record Alerts	Display only MY DEPT contract alerts on employee's calendar.	Yes	Yes	Yes	Yes
Calendar: Display My Contract Dept. Task Alerts	Display only MY DEPT contract task alerts on employee's calendar.	Yes	Yes	Yes	Yes
Calendar: Display My Contract Record Alerts	Display only MY contract alerts on employee's calendar	Yes	Yes	Yes	Yes
Calendar: Display My Contract Task Alerts	Display only MY contract task alerts on employee's calendar.	Yes	Yes	Yes	Yes
Calendar: Display My Request Dept. Task Alerts	Display only MY DEPT request task alerts on employee's calendar.	Yes	Yes	Yes	Yes
Calendar: Display My Request Task Alerts	Display only MY request task alerts on employee's calendar.	Yes	Yes	Yes	Yes
Calendar: Display My Vendor/Customer Task Alerts	Display only MY vendor/customer task alerts on employee's calendar.	Yes	Yes	Yes	Yes



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Calendar: Export to iCal	Allow employee to export their calendar for importing into mail applications like Outlook.	Yes	Yes	Yes	Yes
Contracts: Add	Allow adding of contract records.	Yes	Yes	Yes	No
Contracts: Attachments - Add for All	Allow adding of files/attachments to all contract records.	Yes	Yes	Yes	No
Contracts: Attachments - Add for My Contracts	Allow adding of files/attachments to contract records the employee is directly assigned to.	Yes	Yes	Yes	No
Contracts: Attachments - Add for My Depts.	Allow adding of files/attachments to contract records assigned to departments the employee is assigned to.	Yes	Yes	Yes	No
Contracts: Attachments - Delete for My Contracts	Allow deleting of files/attachments to contract records the employee is directly assigned to.	Yes	Yes	Yes	No
Contracts: Attachments - Delete for My Depts.	Allow deleting of files/attachments to contract records assigned to departments the employee is assigned to.	Yes	Yes	Yes	No
Contracts: Attachments - Prevent Downloading	Prevents employee from downloading attachments on a contract record.	Yes	Yes	Yes	Yes
Contracts: Basic Templates - Allow Export to Word	Allow exporting basic templates to MS Word format. (DEPRECATED)	Yes	Yes	Yes	No
Contracts: Basic Templates - Allow View Access	Allow viewing of basic templates used on a contract record. (DEPRECATED)	Yes	Yes	Yes	Yes



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Contracts: Basic Templates - Edit All	Allow editing of ALL basic templates used on ALL contract records. (DEPRECATED)	Yes	Yes	Yes	No
Contracts: Basic Templates - Edit for My Contracts	Allow editing of basic templates used on contract records the employee is assigned to. (DEPRECATED)	Yes	Yes	Yes	No
Contracts: Basic Templates - Edit for My Dept Contracts	Allow editing of basic templates used on contract records assigned to departments the employee is assigned to. (DEPRECATED)	Yes	Yes	Yes	No
Contracts: Copy Contract	Enable copying of contract records link on the contract details page.	Yes	Yes	Yes	No
Contracts: Delete Any	Allow deleting of all contract records.	Yes	Yes	Yes	No
Contracts: Delete My Contracts	Allow deleting of contract records the employee is directly assigned to.	Yes	Yes	Yes	No
Contracts: Delete My Department Contracts	Allow deleting of contract records assigned to departments the employee is assigned to.	Yes	Yes	Yes	No
Contracts: Edit All Contracts	Allow editing of all contract records.	Yes	Yes	Yes	No
Contracts: Edit My Contracts	Allow editing of contract records the employee is directly assigned to.	Yes	Yes	Yes	No
Contracts: Edit My Department Contracts	Allow editing of contract records assigned to departments the employee is assigned to.	Yes	Yes	Yes	No
Contracts: Links - Add for My Contracts	Allow adding links between contracts for contract records the employee is directly assigned to. (DEPRECATED)	Yes	Yes	Yes	No



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Contracts: Links - Add for My Depts.	Allow adding links between contracts for contract records assigned to departments the employee is assigned to. (DEPRECATED)	Yes	Yes	Yes	No
Contracts: Links - Delete for My Contracts	Allow deleting links between contracts for contract records the employee is directly assigned to. (DEPRECATED)	Yes	Yes	Yes	No
Contracts: Links - Delete for My Depts.	Allow deleting links between contracts for contract records assigned to departments the employee is assigned to. (DEPRECATED)	Yes	Yes	Yes	No
Contracts: Notes - Add	Allow adding notes on contract records the employee has access to.	Yes	Yes	Yes	No
Contracts: Notes - Delete	Allow deleting notes on contract records the employee has access to.	Yes	Yes	Yes	No
Contracts: Search: All Contracts in system	Allow searching within all contracts records when employee is performing searching/reporting actions.	Yes	Yes	Yes	Yes
Contracts: Search: My Departments Contracts	Allow searching within contract records assigned to departments the employee is assigned to when the employee is performing searching/reporting actions.	Yes	Yes	Yes	Yes



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Contracts: Search: Only My Contracts	Allow searching within contract records the employee is directly assigned to when the employee is performing searching/reporting actions.	Yes	Yes	Yes	Yes
Contracts: Search: View Contracts from Search	Show the view link for contracts returned in contract quick search and find/search contract search pages.	Yes	Yes	Yes	Yes
Contracts: Tasks - Add	Allow adding of tasks to ALL contract records.	Yes	Yes	Yes	No
Contracts: Tasks - Add for My Dept. Contracts	Allow adding of tasks on contract records assigned to departments the employee is assigned to.	Yes	Yes	Yes	No
Contracts: Tasks - Add on My Contracts	Allow adding of tasks on contract records the employee is directly assigned to.	Yes	Yes	Yes	No
Contracts: Tasks - Delete My Department Tasks	Allow deleting of tasks on contract records assigned to departments the employee is assigned to.	Yes	Yes	Yes	No
Contracts: Tasks - Delete My Tasks	Allow deleting of tasks on contract records the employee is directly assigned to.	Yes	Yes	Yes	No
Contracts: Tasks - Edit My Department Tasks	Allow editing of tasks on contract records assigned to departments the employee is assigned to.	Yes	Yes	Yes	No



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Contracts: Tasks - Edit My Tasks	Allow editing of tasks on contract records the employee is directly assigned to.	Yes	Yes	Yes	No
Contracts: View all Contracts	Allow view access to ALL contract records.	Yes	Yes	Yes	Yes
Contracts: View Contracts in My Departments	Allow view access to contract records assigned to departments the employee is assigned to.	Yes	Yes	Yes	Yes
Contracts: View My Contracts	Allow view access to contract records the employee is directly assigned to.	Yes	Yes	Yes	Yes
Document Merging: Manage Mergeable Clauses	Allows access and management rights to the Mergeable Clauses setup area to the employee.	Yes	No	No	No
Document Merging: Manage Templates	Allow access and management rights to the Document Templates setup area to the employee.	Yes	No	No	No
Document Merging: Prevent Access to Merged Documents	Prevents employee from accessing Merged Documents on a record.	Yes	Yes	Yes	No
Documents: Prevent Download as MS Word	Prevents employee from downloading a PDF document in Word format.	Yes	Yes	Yes	Yes
Employees: Add	Allow adding of employee records.	Yes	Yes	No	No
Employees: Edit all Employees	Allow editing of all employee records	Yes	Yes	No	No
Employees: Edit Employees in My Departments	Allow editing of employee records assigned to departments the user is assigned to.	Yes	Yes	No	No



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Employees: Edit My Employee Record	Allow editing of employee record of current user.	Yes	Yes	Yes	No
Employees: View all Employees	Allow view access to ALL employee records.	Yes	Yes	Yes	Yes
Employees: View Employees in My Department	Allow view access to employee records assigned to departments the user is assigned to.	Yes	Yes	Yes	Yes
Employees: View My Employee Record	Allow view access to employee record of current user.	Yes	Yes	Yes	Yes
Hierarchy: Create New Hierarchy	Allow creation of hierarchies that contract records can be added into.	Yes	Yes	Yes	No
Hierarchy: Delete Hierarchy	Allow deletion of hierarchies that contract records can be added into.	Yes	Yes	Yes	No
Hierarchy: Manage Hierarchy	Allow management of hierarchies that contract records can be added into.	Yes	Yes	Yes	No
Hierarchy: View Hierarchy	Allow viewing of contract hierarchies.	Yes	Yes	Yes	Yes
Ratings: Delete My Contract/Vendor Ratings	Allow deleting of contract/vendor ratings created by the employee.	Yes	Yes	Yes	No
Ratings: Rate All Contracts	Allow ratings to be created on ALL contract records.	Yes	Yes	Yes	No
Ratings: Rate My Departments Contracts	Allow ratings to be created on contract records assigned to departments the employee is assigned to.	Yes	Yes	Yes	No



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Ratings: Rate Only My Contracts	Allow ratings to be created on contract records the employee is directly assigned to.	Yes	Yes	Yes	No
Reports: Manage All Ad-Hoc Reports/Searches	Allow management of ALL ad-hoc reports.	Yes	Yes	Yes	No
Reports: Manage Custom Searches	Allow management of ALL legacy custom searches. (DEPRECATED)	Yes	Yes	No	No
Reports: Manage My Ad-Hoc Reports/Searches	Allow management of ad-hoc reports the employee is directly assigned to.	Yes	Yes	No	No
Reports: Manage Report Designer	Allow management of ALL report designer reports.	Yes	Yes	No	No
Requests: Add	Allow adding of request records.	Yes	Yes	Yes	No
Requests: Add Tasks	Allow adding of tasks on ALL request records.	Yes	Yes	Yes	No
Requests: Create Records from Accepted Request	Allow creation of new records from an accepted request record.	Yes	Yes	Yes	No
Requests: Delete All Tasks	Allow deleting of tasks on ALL request records.	Yes	Yes	Yes	No
Requests: Delete My	Allow deleting of request records the employee is directly assigned to.	Yes	Yes	Yes	No
Requests: Delete My Dept.	Allow deleting of request records assigned to departments the employee is assigned to.	Yes	Yes	Yes	No
Requests: Delete My Tasks	Allow deleting of tasks on request records the employee is directly assigned to.	Yes	Yes	Yes	No
Requests: Edit All Tasks	Allow editing of tasks on ALL request records.	Yes	Yes	Yes	No



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Requests: Edit My Dept. Tasks	Allow editing of tasks on requests records assigned to departments the employee is assigned to.	Yes	Yes	Yes	No
Requests: Edit My Task	Allow editing of tasks on requests records the employee is directly assigned to.	Yes	Yes	Yes	No
Requests: Edit/Manage All	Allow editing of ALL request records.	Yes	Yes	Yes	No
Requests: Edit/Manage My	Allow editing of request records the employee is directly assigned to.	Yes	Yes	Yes	No
Requests: Edit/Manage My Dept.	Allow editing of request records assigned to departments the employee is assigned to.	Yes	Yes	Yes	No
Requests: Search/View All	Allow searching and viewing of ALL request records.	Yes	Yes	Yes	Yes
Requests: Search/View My	Allow searching and viewing of request records the employee is directly assigned to.	Yes	Yes	Yes	Yes
Requests: Search/View My Dept.	Allow searching and viewing of request records assigned to departments the employee is assigned to.	Yes	Yes	Yes	Yes
Setup: Contract Categories - Manage	Allow management of contract categories list.	Yes	Yes	No	No
Setup: Contract Occurrence List - Manage	Allow management of contract occurrences list.	Yes	Yes	No	No
Setup: Contract Types - Manage	Allow management of contract types list.	Yes	Yes	No	No



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Setup: Departments - Manage	Allow management of departments list.	Yes	Yes	No	No
Setup: Employees/Users - Manage	Allow management of employees.	Yes	No	No	No
Setup: Field Manager	Allow management of field manager area.	Yes	No	No	No
Setup: Location List - Manage	Allow management of locations list.	Yes	Yes	No	No
Setup: Manage Catalogs and Items	Allow management of catalogs and items lists.	Yes	No	No	No
Setup: Manage Contract Clauses	Allow management of contract clauses.	Yes	Yes	No	No
Setup: Manage Legal Holds	Allow management (enabling or disabling) of legal hold on contract records	Yes	Yes	Yes	No
Setup: Status List - Manage	Allow management of statuses list.	Yes	Yes	No	No
Setup: Vendors/Customers - Add	Allow adding of new vendors/customers.	Yes	Yes	No	No
Setup: Vendors/Customers - Add Tasks	Allow adding of tasks on vendors/customers.	Yes	Yes	Yes	No
Setup: Vendors/Customers - Delete All Tasks	Allow deleting of ALL tasks on vendors/customers.	Yes	Yes	Yes	No
Setup: Vendors/Customers - Delete My Tasks	Allow deleting of tasks on vendors/customers created by the employee.	Yes	Yes	Yes	No
Setup: Vendors/Customers - Edit	Allow editing of ALL vendors/customers.	Yes	Yes	No	No
Setup: Vendors/Customers - Edit All Tasks	Allow editing of ALL tasks on vendors/customers.	Yes	Yes	Yes	No



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Setup: Vendors/Customers - Edit My Task	Allow editing of tasks on vendors/customers created by the employee.	Yes	Yes	Yes	No
Setup: Vendors/Customers - Manage	Allow full management of vendors/customers.	Yes	Yes	No	No
Setup: Vendors/Customers - View	Allow view access to vendors/customers list.	Yes	Yes	Yes	Yes
Setup: Workflow - View	Allow view access to workflow manager.	Yes	Yes	Yes	Yes
Setup: Workflows - Manage	Allow management access to workflow manager.	Yes	No	No	No

IntelliSignSM & Document Collaboration Add-On Module Permissions

Permission	Description	Admin User	Super User	Standard User	Read-Only User
Document Authoring: Negotiation Management	Allow access to the <i>Manage Approval Processes</i> and <i>Manage Signature Processes</i> pages to the employee.	Yes	Yes	Yes	No



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Solicitations/Bids Add-On Module Permissions

Permission	Description	Admin User	Super User	Standard User	Read-Only User
Calendar: Display All Solicitation Record Alerts	Display <i>ALL</i> solicitation alerts on employee's calendar.	Yes	Yes	Yes	Yes
Calendar: Display All Solicitation Task Alerts	Display <i>ALL</i> solicitation task alerts on employee's calendar.	Yes	Yes	Yes	Yes
Calendar: Display My Solicitation Dept. Record Alerts	Display only <i>MY DEPT</i> solicitation alerts on employee's calendar.	Yes	Yes	Yes	Yes
Calendar: Display My Solicitation Dept. Task Alerts	Display only <i>MY DEPT</i> solicitation task alerts on employee's calendar.	Yes	Yes	Yes	Yes
Calendar: Display My Solicitation Record Alerts	Display only <i>MY</i> solicitation alerts on employee's calendar.	Yes	Yes	Yes	Yes
Calendar: Display My Solicitation Task Alerts	Display only <i>MY</i> solicitation task alerts on employee's calendar.	Yes	Yes	Yes	Yes
Setup: Solicitation Types - Manage	Allow management of solicitation types list.	Yes	Yes	No	No
Solicitations - Add Contracts	Allow employee to create contract records off of a solicitation record.	Yes	Yes	Yes	No
Solicitations: Add	Allow adding of solicitation records.	Yes	Yes	Yes	No
Solicitations: Add Notes	Allow adding of notes to <i>ALL</i> solicitation records.	Yes	Yes	Yes	No
Solicitations: Add Tasks - Limit to User	Allow adding tasks on solicitation records the employee is directly assigned to.	Yes	Yes	Yes	No



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Solicitations: Add Tasks - Limit to User Depts.	Allow adding tasks on solicitation records assigned to departments the employee is assigned to.	Yes	Yes	Yes	No
Solicitations: Delete My	Allow deleting of ALL solicitation records.	Yes	Yes	Yes	No
Solicitations: Delete My Departments	Allow deleting of solicitation records assigned to departments the employee is assigned to.	Yes	Yes	Yes	No
Solicitations: Delete My Dept. Tasks	Allow deleting of tasks on solicitation records assigned to departments the employee is assigned to.	Yes	Yes	Yes	No
Solicitations: Delete My Tasks	Allow deleting of tasks on solicitation records the employee is directly assigned to.	Yes	Yes	Yes	No
Solicitations: Edit All	Allow editing of ALL solicitation records.	Yes	Yes	Yes	No
Solicitations: Edit My	Allow editing of solicitation records the employee is directly assigned to.	Yes	Yes	Yes	No
Solicitations: Edit My Departments	Allow editing of solicitation records assigned to departments the employee is assigned to.	Yes	Yes	Yes	No
Solicitations: Edit My Dept. Tasks	Allow editing of tasks on solicitation records assigned to departments the employee is assigned to.	Yes	Yes	Yes	No
Solicitations: Edit My Tasks	Allow editing of tasks on solicitation records the employee is directly assigned to.	Yes	Yes	Yes	No



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Solicitations: Notes: Delete	Allow deleting notes on <i>ALL</i> solicitation records.	Yes	Yes	Yes	No
Solicitations: Search: All Solicitations in system	Allow searching of <i>ALL</i> solicitation records.	Yes	Yes	Yes	Yes
Solicitations: Search: My Departments Solicitations	Allow searching of solicitation records assigned to departments the employee is assigned to.	Yes	Yes	Yes	Yes
Solicitations: Search: Only My Solicitations	Allow searching of solicitation records the employee is directly assigned to.	Yes	Yes	Yes	Yes
Solicitations: Search: View Solicitations from Search	Show the <i>view</i> link for solicitations returned on the find/search solicitation search page.	Yes	Yes	Yes	Yes
Solicitations: View All	Allow view access to <i>ALL</i> solicitation records.	Yes	Yes	Yes	Yes
Solicitations: View My	Allow view access to solicitation records assigned to departments the employee is assigned to.	Yes	Yes	Yes	Yes
Solicitations: View My Departments	Allow view access to solicitation records the employee is directly assigned to.	Yes	Yes	Yes	Yes



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Purchase Orders Add-On Module Permissions

Permission	Description	Admin User	Super User	Standard User	Read-Only User
Calendar: Display All Purchase Order Task Alerts	Display <i>ALL</i> purchase order task alerts on employee's calendar.	Yes	Yes	Yes	Yes
Calendar: Display My Purchase Order Dept. Task Alerts	Display only <i>MY DEPT</i> purchase order task alerts on employee's calendar.	Yes	Yes	Yes	Yes
Calendar: Display My Purchase Order Task Alerts	Display only <i>MY</i> purchase order task alerts on employee's calendar.	Yes	Yes	Yes	Yes
Payment Processing: Release Checks/Payments	Allow management of checks/payments including the releasing of funds.	Yes	Yes	Yes	No
Purchase Orders: Add New	Allow adding of purchase order records.	Yes	Yes	Yes	No
Purchase Orders: Add Tasks - Limit to User	Allow adding of tasks on purchase order records the employee is directly assigned to.	Yes	Yes	Yes	No
Purchase Orders: Add Tasks - Limit to User Depts.	Allow adding of tasks on purchase order records assigned to departments the employee is assigned to.	Yes	Yes	Yes	No
Purchase Orders: Attachments: Add All	Allow adding of files/attachments on <i>ALL</i> purchase order records.	Yes	Yes	Yes	No
Purchase Orders: Attachments: Add for My	Allow adding of files/attachments on purchase order records the employee is directly assigned to	Yes	Yes	Yes	No



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Purchase Orders: Attachments: Add for My Dept.	Allow adding of files/attachments on purchase order records assigned to departments the employee is assigned to.	Yes	Yes	Yes	No
Purchase Orders: Attachments: Delete All	Allow deleting of files/attachments to ALL purchase order records.	Yes	Yes	Yes	No
Purchase Orders: Attachments: Delete for My	Allow deleting of files/attachments on purchase order records the employee is directly assigned to.	Yes	Yes	Yes	No
Purchase Orders: Attachments: Delete for My Dept.	Allow deleting of files/attachments on purchase order records assigned to departments the employee is assigned to.	Yes	Yes	Yes	No
Purchase Orders: Delete All	Allow deleting of ALL purchase order records.	Yes	Yes	Yes	No
Purchase Orders: Delete My	Allow deleting of purchase order records the employee is directly assigned to.	Yes	Yes	Yes	No
Purchase Orders: Delete My Dept. Tasks	Allow deleting of tasks on purchase order records assigned to departments the employee is assigned to.	Yes	Yes	Yes	No
Purchase Orders: Delete My Depts.	Allow deleting of purchase order records assigned to departments the employee is assigned to.	Yes	Yes	Yes	No
Purchase Orders: Delete My Tasks	Allow deleting of tasks on purchase order records the employee is directly assigned to.	Yes	Yes	Yes	No



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Purchase Orders: Edit All	Allow editing of <i>All</i> purchase order records.	Yes	Yes	Yes	No
Purchase Orders: Edit My	Allow editing of purchase order records the employee is directly assigned to.	Yes	Yes	Yes	No
Purchase Orders: Edit My Dept. Tasks	Allow editing of tasks on purchase order records assigned to departments the employee is assigned to.	Yes	Yes	Yes	No
Purchase Orders: Edit My Depts.	Allow editing of purchase order records assigned to departments the employee is assigned to.	Yes	Yes	Yes	No
Purchase Orders: Edit My Tasks	Allow editing of tasks on purchase order records the employee is directly assigned to.	Yes	Yes	Yes	No
Purchase Orders: Manage/Process Check Payments	Allow management and processing of check payments.	Yes	Yes	Yes	No
Purchase Orders: View All	Allow view access to <i>ALL</i> purchase order records.	Yes	Yes	Yes	Yes
Purchase Orders: View My	Allow view access to purchase order records the employee is directly assigned to.	Yes	Yes	Yes	Yes
Purchase Orders: View My Depts.	Allow view access to purchase order records assigned to departments the employee is assigned to.	Yes	Yes	Yes	Yes